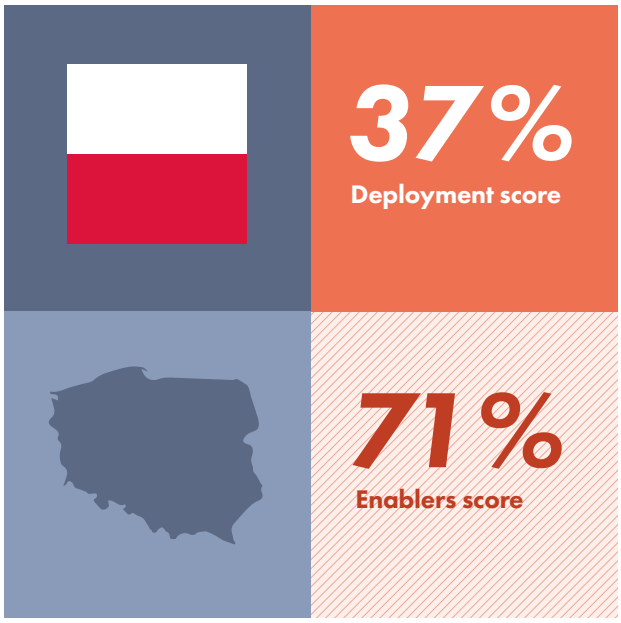
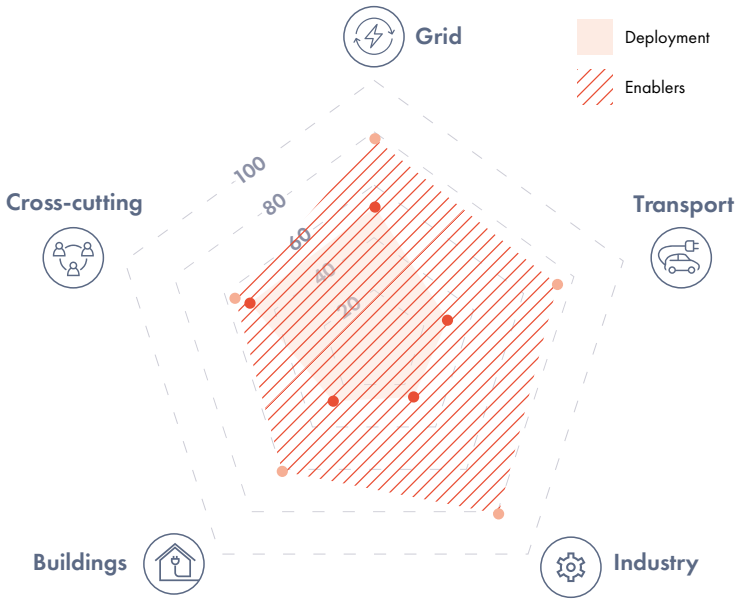
ANNEX: COUNTRY PROFILES

POLAND





Poland has a solid Enablers score (71%), built on the Renewable Energy Sources (RES) Auction System (which guarantees renewable energy producers a fixed price for 15 years), the Grid Act's cable-pooling reform (letting new renewables share a single connection point, unlocking an estimated 150 GW of new capacity), and large-scale finance mobilization through Poland's national environmental fund (NFOŚiGW) which is allocating PLN 37 billion (~ USD 10 billion) 2026 allocation. However, its deployment score (37%) is the lowest of the five European countries assessed. Grids are congested and unreliable, investment in grid infrastructure is low, electricity costs are high for households and businesses, and electrification of transport, industry, cooking, and heating all lag, alongside a shortage of qualified electrical trade workers.

Several structural gaps explain the difference between policy and delivery. Grid connection permitting is slow; there's no explicit national target for electrifying final energy use; over 80% of households remain on regulated tariffs rather than market-based ones; several electric vehicle (EV) incentives are set to taper in 2026 just as Poland seeks to scale EV adoption; and its coal phaseout date of 2049 is the furthest of the European countries in scope.

Closing these gaps could start with treating the reskilling capacity gap — there are an estimated 78,500 direct and 21,000 indirect coal mining jobs at stake in Upper Silesia, however just 2,200 people have participated in reskilling programs in Eastern Greater Poland until now. Addressing this alongside binding interim milestones on the coal phaseout — tied to the EU's Social Climate Fund — would give both workers and investors a clearer, more credible view on the transition timeline.

Another action to close the gap is improving policy coherence. NFOŚiGW funding today is a set of separate programs rather than one named industrial-electrification strategy; there is no manufacturing cluster comparable to France's Vallée de la Batterie, and most support is aimed at efficiency and clean generation broadly rather than direct electrification.

Binding standards, for example updating the Energy Policy of Poland (PEP2040) with an explicit electrification target and introducing a rental-ban mechanism for the least-efficient existing homes, currently absent, could convert incentives that exist today into standards that last, rather than support that people and landlords can simply opt out of. Separately, the case for urgency on the grid side is just as concrete: 223 GWh of solar generation was curtailed in April 2025 simply because the grid couldn't absorb it, a sign that generation buildout is currently outpacing grid and storage flexibility, and that closing this gap should be treated as its own priority alongside the demand-side work above.

Acting on both fronts — building the workforce to do the work and turning scattered incentives into one coherent electrification strategy — could help Poland convert its strong policy foundations into the faster deployment its competitiveness depends on.

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In the table below, 'Deployment' indicators include sales of EVs and heat pumps, grid congestion and flexibility metrics, and share of clean power, as well as key indicators influencing the business case, such as cost differences versus fossil technologies. 'Enablers' covers government plans, incentives, and regulations. See Methodology Annex for details.

NORMALIZED SCORE	AREAS OF STRENGTH	AREAS FOR IMPROVEMENT
GRID & POWER MARKET **16/30** DEPLOYMENT **23/30** ENABLERS	The RES Auction System guarantees winning renewable generators fixed 15-year revenue via a contract-for-difference structure — although in practice auctions received almost no bids, because investors are opting into power purchase agreements (PPAs) instead. The Grid Act's April 2026 cable-pooling reform unlocks an estimated 150 GW of new connection potential.	223 GWh of solar generation was recently curtailed — evidence that grid capacity and flexibility are not yet keeping pace with renewables growth. Four state-controlled groups dominate generation and supply. Permitting delays are long and the spatial planning system faces severe strain due to a municipal-level overhaul, chronic staff shortages, and delayed integration of EU renewable energy mandates.
TRANSPORT **6/20** DEPLOYMENT **15/20** ENABLERS	A comprehensive EV package (NaszEauto/Mój Elektryk up to PLN 40,000, a dedicated N2/N3 heavy-truck program with a new PLN 2 billion (USD 500 million) round, full tax deductibility through 2026) pairs with strong charging infrastructure.	2026 reductions in incentives — through a lower ownership-tax discount and reduced business tax deductibility — coincide with Poland's efforts to scale EV adoption; Poland also has the highest VAT rate of the five European countries (23%), with no EV-specific relief.
INDUSTRY **5/20** DEPLOYMENT **16/20** ENABLERS	NFOŚiGW's PLN 37 billion (about USD 10 billion) 2026 allocation spans 48 priority programs and more than 30 funding calls. Separately, FEnIKS has allocated PLN 184 million (about USD 47 million) to improve energy efficiency in medium and large enterprises, including through upgrades to production processes.	Individual funding components exist but aren't packaged into a coherent named strategy, and no manufacturing cluster comparable to France's Vallée de la Batterie was identified. Support is primarily directed towards efficiency, renewable generation and broader clean-industry investments rather than direct industrial electrification per se.
BUILDINGS **5/20** DEPLOYMENT **12/20** ENABLERS	Czyste Powietrze is a large-scale program linking home renovation and heating replacement with air-quality improvements, and provides significant support for heat pumps. Moje Ciepło supports heat pumps in new-build homes; its current application round is scheduled to run until 26 February 2027 or until funds are exhausted. Poland has also been assessed to have about 1,200 MW of demand-side response potential—around 5% of peak demand. A household storage programme is scheduled to open on 20 October 2026, with PLN 1 billion (about USD 257 million) for electricity and heat storage.	Delivery and scale remain challenges. The proposed 2026 technical building regulations were not adopted; WT2021 remains in force for 18 months from 20 September 2026. Around 2.5 million coal-based heating systems remain to be replaced, making heat-pump deployment and installer capacity important priorities. Czyste Powietrze requires an energy audit, and support for electric heating other than heat pumps ends from 2027; the programme's design and delivery need continued monitoring to protect efficiency, quality and trust. Dynamic-price uptake remains low: 4,836 households had such contracts at the end of 2025.
CROSS-CUTTING **5/10** DEPLOYMENT **6/10** ENABLERS	Poland is the largest single Social Climate Fund recipient (EUR 11.4 billion).	The coal phaseout law (December 2025) runs only to 2049 — the slowest timeline among European countries. Workforce development is the most acute gap. Poland, with Italy, leads 10 EU member states pushing to reconsider ETS2's design on cost-protection grounds.
TOTAL SCORES	**37/100** DEPLOYMENT	**71/100** ENABLERS

*Scores may not sum perfectly due to rounding. Data quality concerns: **low.** Poland had solid coverage across the data metrics, with challenges only in EV truck data and industrial electrification projects.*

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The goal of this index is to inspire action, maximize strengths, and work toward improvement opportunities. All stakeholders have a role to play, but policy often sets the tone for sustained, market-based change.

In the table below we have reviewed the above findings against WMBC's 10 Policy Principles to Seize the Electric Advantage. Some key gaps identified related to workforce capacity and coal-transition planning could benefit from following Principles 1 and 10 to add binding interim milestones to the 2049 coal phaseout and treat the reskilling shortfall as Poland's single highest-priority intervention. This could help improve Poland's energy security and competitiveness by giving businesses a credible transition timeline. Addressing gaps in targets and industrial strategy can be helped by Principles 2 and 9, which pair an explicit electrification-of-final-energy target with a single, named industrial-electrification strategy linking NFOŚiGW's funding to Poland's EV and charging incentive programs.

STATUS ■ **STRONG SIGNS OF IMPLEMENTATION** ■ **MIXED IMPLEMENTATION** ■ **NOTABLE GAPS**

POLICY PRINCIPLE	RECOMMENDATIONS
1. Reinforce clean electrification as a shared strategic priority across international forums	*This has not been assessed for country comparison, as electrification remains at an early stage of discussion in international forums. Emerging examples of best practice are highlighted under "Best practice policies" in the "Findings for policymakers and advocacy" section.*
2. Set clear targets and timelines for electrification	Update the PEP2040 with an explicit electrification share-of-final-energy target, following France's PPE3 model, rather than continuing to rely solely on renewables-share proxies.
3. Realign financial incentives and taxation to support electrification	Reconsider the timing of the ownership-tax discount phaseout; removing this incentive in 2026, the same year Poland is trying to scale EV adoption, sends a contradictory signal. Consider EV VAT relief. Reconsider the business tax-deductibility phaseout. Continue the coal-subsidy reduction trajectory, publish a multi-year forward path comparable to Italy's SAD Catalogue targets. Set out a path to bring the industrial electricity-to-gas price ratio (currently above 3x) toward the EU Electrification Action Plan's 2x benchmark for 2030, including by rebalancing energy taxation, so electricity is not taxed more heavily than gas.
4. Ensure electricity markets reward clean, flexible supply and demand	Streamline the virtual PPA approval process. Publish a clear public comparison of the RES Auction System and the corporate-PPA market side by side. Scaling demand side response participation beyond current levels and accelerating smart meter rollout to unlock dynamic pricing at scale are both prerequisites for absorbing the curtailed generation flagged under Principle 5.
5. Deliver modern electricity systems including grids and enabling infrastructure	Treat the solar curtailment figure (223 GWh) as an early-warning indicator; generation buildout is currently outpacing grid/storage flexibility capacity, and closing this gap should be prioritized. Maintain momentum on the Grid Act's cable-pooling reform by publishing measured outcomes. Add an explicit long-duration storage element to the Grid Act reforms currently only covering batteries. Ensure the heavy-duty truck charging program and NFOŚiGW's broader charging buildout are sequenced with the grid-connection infrastructure funding.

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STATUS ■ **STRONG SIGNS OF IMPLEMENTATION** ■ **MIXED IMPLEMENTATION** ■ **NOTABLE GAPS**

POLICY PRINCIPLE	RECOMMENDATIONS
6. Streamline permitting and grid connection processes	Fast-track the electronic grid-connection application system referenced in PSE's (Poland's national electricity operator) 2026 roadmap to compound the cable-pooling reform's benefit. Make a systematic investment in a comprehensive environmental permitting system to speed up permitting for electrification in line with proposals from Instytut Reform.
7. Mobilize finance and de-risk investment	Design any new long-term contracts or other de-risking support to prioritize industrial heat electrification, starting with low- and medium-temperature applications where near-term opportunities are strongest. One possible solution is the use of unilateral contracts for difference for heat production from electricity. Complement this with support for assessing and demonstrating electrification options for high-temperature heat.
8. Use regulatory standards and mandates to accelerate deployment of electric solutions	Raise the ambition at which Poland implements the EU Clean Vehicles Directive for clean mobility in public procurement tenders. Increase the targets for the share of clean light-duty (22% compared to 38.5% for e.g. Germany) and heavy-duty (9% compared to 15% in e.g. Germany) in public procurement tenders and ensure that as high a share as possible of those are zero-emission vehicles. Introduce a phased rental-ban mechanism for the lowest-efficiency existing residential buildings, following France's DPE-ban model or the U.K.'s Minimum Energy Efficiency Standards — currently absent despite being flagged as a gap in Poland's own building-standards assessment.
9. Integrate electrification into industrial strategies and trade policy	Develop an explicit, named industrial-electrification strategy — individual funding components exist but are not currently packaged as a single coherent strategy. Link the clean-technology manufacturing program (EUR 1.2 billion) more explicitly to Poland's EV and truck-charging incentive programs (Principles 3 and 5), creating a demand-pull/supply-build feedback loop.
10. Build the skilled workforce needed to electrify the economy	Scale coal-related reskilling using region-specific forecasts of workers affected and training capacity. Align training with projected demand for grid, building and industrial electrification skills needs.